Antonelli Financial Advisors
Investment Management & Comprehensive Wealth Planning

Our Investment Philosophy

We are investors, which means we select securities with a long-term view of their fit in a client's portfolio. We know our clients' investment portfolios are key to their long-term success and security. Our clients hire us as their professional investment manager to take the emotion out of investing. The adage, Buy Low/Sell high will always be true, but rarely implemented by an individual investor.

In the near term, markets rise and fall dramatically with uncertainty and media hype. As investors process and take the time to understand what news events mean to the world economy and global markets cooler heads prevail. Short-term fluctuations are driven by fear and greed, emotions that we acknowledge and hold in check. We view market volatility as an opportunity to rebalance portfolios to better position them to take advantage of short-term market emotions (Buy Fear, Sell Greed).

We believe that the world will continue to grow, and offers great opportunity to build wealth for our clients. We cannot predict when and where these opportunities will arise and we must build widely diversified portfolios for our clients that include small, medium, and large companies that operate both in the United States and in developed foreign countries as well as emerging market economies. Diversification and allocation to various asset classes are an investor's best protection and opportunity to reach their long-term goals.